CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 2.1

This bulletin provides important information about the 2.1 release of Client Collaboration. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release - Firm User Updates

FIRM ADMINISTRATION UPDATES

Payment Settings
You can now specify a URL for your firm's electronic payment gateway. The URL appears as a "Pay" link on the Billing tile in the client hub. Clients can click the link to submit their invoice payment. If no URL is specified, the payment link does not display to clients.

File Retention Settings
A new file retention setting allows your firm to set retention for files delivered to clients using Document Locker. By default, firm-delivered files are retained for 2 years. You can choose a shorter period in three-month increments up to 24 months. Files uploaded by clients are always retained for 2 years. If you change a retention setting, you receive an email once the expiration dates for all existing files are updated.

Audit Logging
Additional audit logging has been added to Client Collaboration to record key activities that occur in the system. The audit logs now track more than 85 activities and include the following information: date/time the activity occurred, IP address of the device, device type, Web browser, User ID (where appropriate). Audit log reporting is planned for a future release.

FIRM REQUESTS DASHBOARD

Firm Overview Dashboard
A new overview dashboard provides a visual representation of client requests in their various stages of completion, with the ability to drill down into any status.

- In the Request Status pane, a doughnut chart displays the total number of requests and the number of requests in each status. Click a segment in the doughnut chart to view the list of requests in that status.

- Below the Request Status pane, tiles have been added to indicate the number of reopen requests from clients and the number of overdue requests. Click the link in a tile to open the relevant list of requests.

- In the New Documents Received pane, you can view a list of clients who have recently uploaded new documents. Below the pane, two additional tiles have been added to call out any errors while creating or sending requests in batch.

Dashboard Statuses
Some of the firm dashboard statuses have been renamed to better represent the requests that are in each status, and new statuses have been added. Requests fall into one of the following seven statuses, shown in workflow order:

- **Ready to Send** – Requests have been created and queued to be sent later (clients have not been invited yet).

- **Client in Progress** – Requests have been sent to clients and are awaiting completion by clients.

- **Return Ready to Start** – Requests have been closed by the client or the firm, and documents are ready for download so that the return preparation can begin.

- **Return in Progress** – Requests have been closed, and documents have been downloaded; tax returns are in progress.

- **Awaiting Return Signature** – Returns have been sent to the client for review and electronic signing on Form 8879.

- **Return Signature Received** – Required signatures have been received on Form 8879, and the return can be electronically filed.

- **Finalized** – This is the final step in the workflow. All other steps have been completed. Firms may move requests to Finalized status at any time to skip any remaining steps. Requests are automatically moved to the Finalized status 30 days after the required return signatures have been received, if not already moved by the firm. The Document Locker can be accessed from the Actions menu throughout the year for clients with finalized tax return workflows.

New tiles have been added to provide visibility and easy access to the following:

- **Reopen** – Displays the number of requests your clients have asked you to reopen. Click **View reopen requests** to review the list of requests clients would like to reopen.

- **Overdue –** Displays the number of overdue requests (either for the engagement letter or organizer) across clients. Click **View overdue requests** to view all the overdue requests. Keep in mind that Client Collaboration automatically sends reminder emails to clients for upcoming and overdue tasks, so follow-up may only be necessary for far overdue requests.

- **Errors** – Displays the number of errors that occurred when creating or sending requests in batch. Click **View errors** to view the requests that failed to create or send.

- **Sending Details** – Displays the number of batch requests and the overall health status. If everything is working as expected, the status shows green. If there is an error, the status shows red instead. Click **View batch requests** to view all the batch requests.

Other Firm Dashboard Updates
The request status tabs have been removed and replaced with a simpler filtering system that provides filters for tax year, service type, and request status, offering you more flexibility when filtering data. Selecting a different request status in the drop-down list updates the grid to show requests in the selected status. A back button returns you to the Firm Overview Dashboard.

The Resend invitation option has been added to some Action menus to allow firms to add or remove a spouse user when sending for 8879 signatures.

For requests on the new **Awaiting Return Signature** status, four options are available on the Actions menu: Resend invitation, Finalize request, Download tax documents, and View files in Document Locker.

For Requests on the new **Return Signature Received** status, you have three options available on the Actions menu: Finalize request, Download tax documents, and View Files in Document Locker.

From the **Finalized** Requests view, you have two options in the Actions menu: Download tax documents and Open the client's Document Locker.

8879 eSign Process
The 8879 eSign process is now available so you can send returns to your clients for their review and electronic signature.

Download Only New Items
After a client's request has been closed, your clients can still upload missing documents. This new option allows you to download only the files added since the request was closed. Selecting this option does not move the request to the Return in Progress status. This option is only available from the Return Ready to Start status or Return in Progress status. It is hidden if there are no new items to download.

Secure Two-Way Messaging - Print Transcript
You can now select one or more secure two-way messages, and then generate a PDF transcript of the conversation that can be maintained with your source documents.

Email Notifications for Secure Two-Way Messaging
When secure two-way messages are sent by the client or the firm, the recipients receive an email notification with a link to the Client Collaboration hub.

- When the firm sends a secure message, both the taxpayer and spouse (if invited) receive an email with a link to log in to their Client Collaboration hub and instructions to retrieve the secure message. The topic of the message is included in the email message; however, to keep the message contents secure, clients must log in to Client Collaboration to read or respond to the message.

- When a client sends a secure message to the firm, the message is delivered to the appropriate client responsible staff person assigned to the client. The firm can configure a primary client responsible staff role and a secondary client responsible staff role. If no one is assigned to the primary role, then the secondary role is used. If neither is configured, no email is sent; however, the message notification icon displays in the Requests grid to indicate outstanding messages.

Invoice Center
The new invoice center allows you to send and manage invoices for your clients through Client Collaboration. You can upload PDFs and other common file formats (PNG, TXT, etc.). If an invoice with the same file name already exists, the new invoice is added with (#) appended to the end of the filename. You can download or delete an existing invoice. Deleted invoices still appear in the list for historical purposes, but cannot be downloaded or accessed. All invoices uploaded through the Invoice Center are automatically stored in the client's Document Locker, with the Invoice tag automatically applied. Click the **Activity Details** button to display activity for the selected invoice.

PDF Organizer Updated
The completed PDF organizer that you download from Client Collaboration has been updated for tax year 2020, and now includes Schedules C and E, Reply with Amount values, and custom questions and answers.

New in this Release - Taxpayer Updates

Welcome Back Email
Returning client users receive a "Welcome Back" email with a Get Started button, instead of the "It's Tax Time" email with the Register My Account button. Returning clients can log in with their previously created user credentials. When sending requests in batch, the appropriate email is sent automatically, depending on if the client user is new or returning. If returning users forget their user ID or password, they can use links on the login page to recover their User ID or reset their password.

Email Notifications for Secure Two-Way Messaging
When the firm sends a secure two-way message to a client, both the taxpayer and spouse (if invited) receive an email with a link to log in to their Client Collaboration hub and instructions to retrieve the secure message. The topic of the message is included in the email message; however, to keep the message contents secure, clients must log in to Client Collaboration to read or respond to the message. When a client sends a secure message to the firm, the message is delivered to the appropriate client responsible staff person assigned to the client.

Billing Pane
A new Billing pane has been added to your client's Collaboration hub home screen. Your client can review a PDF copy of their invoice, which you send to them through the Invoice Center. Clients can view a list of their most recent invoices, with the invoice date and name displayed. Clients can download a copy of the invoice to review it.

If the firm has configured the ePayment Gateway URL in the Administrative section, then clients also see a Pay link next to each invoice. Click the **Pay** link to open a new browser tab pointed to the firm's ePayment Gateway URL. Clients can submit a payment and then close out to return to Client Collaboration. The Mark as Paid option removes the invoice from the Billing Pane; however, a copy remains available in the client's Document Locker for reference.

Simplified Client Task List

The Client Task list has been updated for consistency and to simplify the process for clients. Hyperlinks have been replaced with easier-to-see blue buttons. The three sections of the organizer have been combined into a single section labeled "Complete Organizer," with three steps: 1) Answer Questionnaire, 2) Attach Documents, and 3) Send to my Accountant. Progress bars indicate the clients' progress on both the questionnaire and the document request list. Due dates display for both signing the engagement letter and completing the organizer.

Document Request List - Show Only Missing Documents

When viewing the Document Request list, there is now a *Show only missing documents* toggle button. By default, this button is toggled off so that the client can view the entire list of requested documents. Clients can toggle the button on to hide documents that have already been collected. While completing the Document Request list, clients can view the number of outstanding documents at any time with the new indicator at the top of the request list.

Open Items/Missing Items List

After marking their organizer request complete, clients can now see on the Task list if there are any missing documents that are required by the firm to complete their tax return. Clients can click **Go to Missing Items** to return to the Document Request list, filtered to only show missing items. The client can toggle the filter off to view all request list items, if needed.

Document Request List - New File Actions

While completing the Document Request list, instead of providing copies of documentation, clients can choose one of several new options to indicate to the firm if they will provide a document. The following four new options have been added:

- **Reply with Amount** - Clients can provide a dollar amount instead of physical documentation. If a document is later added to the line item, it replaces the amount entered. Selecting this option and entering a dollar amount marks the requested document as received, and the amount will display on the printed/PDF organizer.

- **Attached Above/Below** - Clients can select this option to indicate that they have already attached a document to the request list or that it was automatically uploaded by a financial connection. Selecting this option marks the requested document as received, and "Attached Above/Below" will display on the printed/PDF organizer.

- **Previously Sent** - Clients can select this option to indicate that they previously sent a document to the firm. This option is useful for items on the missing items list which may have been sent previously with other documents. Selecting this option marks the requested document as received, and "Previously Sent" will display on the printed/PDF organizer.

- **Firm has on File** - Firms produce K-1s and other documentation that clients do not need to provide. Clients can indicate if the firm provides the document or if the firm already has the document on file. Selecting this option marks the requested document as received, and "Firm has on File" will display on the printed/PDF organizer.

Schedule C and Schedule E Organizers

A new Business or Rental/Royalty tile is now available. Answering "Yes" to a new question on the Taxable Events questionnaire activates this tile. Prior year businesses from pro forma data shows throughout. Your clients can add, edit, and delete businesses.

The Business organizer is divided into sub-sections represented by the following tiles:

- **General** – Gather basic business information from your clients such as business name, address, and phone number. This section provides a large text field to describe any significant changes in business activity. An option on the General tile allows the client to attach documents instead of filling out the organizer. Selecting this option adds a new item to the Document Request list to remind the client to attach the required documentation.

- **Income & Cost of Goods Sold** – This section provides a field for gross receipts/sales for the year, along with prior year information for reference. An Other Income table allows your client to add other income details for the year. Clients can view prior year information, edit values for the current year, and add new line items. There is a field to report returns and allowances to deduct. The Cost of Goods Sold section allows clients to report values of inventory, purchases, cost of labor, materials or supplies, and ending inventory value.

- **Expenses** – This section provides a list of common business expenses (car and auto, insurance, interest, legal and professional fees, office expenses, pension, rent/lease, repairs or maintenance, supplies, travel, meals, utilities, wages and more) with prior year data, if available. A new Other Expenses table has been added so the client can detail any additional expenses not captured elsewhere.

- **Assets** – This section provides a list of assets. The user can add, edit, and delete assets. Asset details include purchase date/cost and sale date/price values for each asset.

- **Vehicles** – This section provides a list of vehicles. The taxpayer can add, edit, and delete vehicles. Once a vehicle is added, the client can edit the details for that vehicle, such as a description of the vehicle, the date placed in service, and the disposition date. Taxpayers can report mileage details (total miles, total business miles, total commuting miles for the year), gasoline and oil expenses, repairs, insurance, interest, taxes, and vehicle rentals/leases. There is also an Other Vehicle Expenses list where the client can add custom expenses for the vehicle.

- **Home Office** – This section provides a list of home offices. The taxpayer can add, edit, and delete home offices. Once a home office is added to the list, the client can add details such as a description and status. Taxpayers can also provide details about the square footage of their office space, the total home square footage, and the total hours used daily.

  A new Home Office Expenses table has been added where the taxpayer can report a new custom home office expense, as well as edit and delete existing home office expenses. For all home office expenses, clients can allocate both direct and indirect expenses to each line item.

- **Statutory Employee Expenses** – This section provides a list of statutory employees. The taxpayer can add, edit, and delete statutory employees. Once an employee is added to the list, the taxpayer can then add details and related expenses.